



Printing & Exporting from EBI

Overview

In EBI, there are 2 different ways to export and print, each with slightly different results. Exporting/printing within the section will result in only the content within that section being exported/printed, while exporting/printing from the Page Options menu allows a user to export/print the entire dashboard page. EBI also allows users to export visualizations to PowerPoint for use in presentations

Review of Dashboard Elements

It is important to understand some of the terminology related to the elements of a dashboard in order to understand the differences in the 2 export/print options.

Dashboard Section

- A dashboard section is an area on a dashboard page that contains elements of data or visualizations. One dashboard page can be made up of many sections.
- Each section is contained within a gray box.
- See image below. Data within the red box is 1 section on this dashboard page. You can see that there are several other sections on the same dashboard page.

Budget Position Summary & Detail Report

Unrestricted Operating Budgets | Non-Sponsored Projects | Sponsored Projects

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As: Chelsea Lee

Emory University Unrestricted Operating Budget (UOB)
As of Date: 08/09/2018
Date run: 6/3/2019

UOB FORMAT: UOB Summary

Department	Original Budget (\$)	Budget Revision (\$)	Budget (\$)	MTD Actual (\$)	FYTD Actual (\$)	LTD Encumbrance (\$)	Budget Variance (\$)	Favorable / (Unfavorable)	% Used FYTD
E33029-ECAS Classics	1,231,176.00	16,227.00	1,247,403.00	111,147.28	1,246,296.30	381.05		731.65	99.91%
Grand Total	1,231,176.00	16,227.00	1,247,403.00	111,147.28	1,246,296.30	381.05		731.65	99.91%

Refresh - Print - Export

There are no General Ledger to Report Reconciliation Items for your prompt! Selections

Refresh

Month-To-Date Transaction Detail
Last Date run: 6/3/2019
Fiscal Year Prompted: 2018 | Month Prompted: PD 12 - August

Account	Department	Fund Code	Program	Event	Journal ID	Journal Date	Accounting Period	Fiscal Year	Journal Created by	Journal Header Desc	Journal Line Desc	Journal Line Ref	Expense Report ID	Expense Report Traveler	Purchaser Name	Vendor Desc	PO ID	Voucher ID	Invoice Num	Accounting Line Desc
50110-Sal-Faculty-Tenured	E33020-ECAS Classics	1002	00000-Default Program	0000-Default event	PH0238791	8/31/2018	12	2018	EM_FSBATCH	Payroll Journal	Payroll Journal	-	-	-	-	-	-	-	-	-
50120-Sal-Faculty-NonTenured	E33020-ECAS Classics	1002	00000-Default Program	0000-Default event	PH0238791	8/31/2018	12	2018	EM_FSBATCH	Payroll Journal	Payroll Journal	-	-	-	-	-	-	-	-	-
50190-Sal-Prof NonTenured	E33020-ECAS Classics	1002	00000-Default Program	0000-Default event	PH0238791	8/31/2018	12	2018	EM_FSBATCH	Payroll Journal	Payroll Journal	-	-	-	-	-	-	-	-	-
50320-Sal-Clerical/Secretarial	E33020-ECAS Classics	1002	00000-Default Program	0000-Default event	PH0238876	8/1/2018	12	2018	EM_FSBATCH	Payroll Journal	Payroll Journal	-	-	-	-	-	-	-	-	-



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Dashboard Page

- A dashboard page is similar to a “tab” in Excel.
- One dashboard page may include several sections containing elements of the dashboard, such as prompts, data tables, visualizations, etc.

Budget Position Summary & Detail Report

Unrestricted Operating Budgets | Non-Sponsored Projects | Sponsored Projects

EMORY UNIVERSITY
Budget Position - Unrestricted Operating Budget

* As of Date
<- 08/09/2018

Fund Group
Unrestricted Operating Budget

Fund
(All Column Values)

Emory University Unrestricted Operating Budget (UOB)
As of Date : 08/09/2018
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Department	Original Budget (\$)	Budget Revi
833020- ECAS: Classics	1,231,176.00	16
Grand Total	1,231,176.00	16

Page Options Menu

- The Page Options menu offers users a variety of selections that may be performed against a dashboard
- The Page Options menu is accessible by clicking on the page options icon in the top right corner of the page, under the user’s name.

Open Signed In As Chelsea Long

Print

Export to Excel

Refresh

Create Bookmark Link

Create Prompted Link

Apply Saved Customization

Save Current Customization...

Edit Saved Customizations...

Clear My Customization

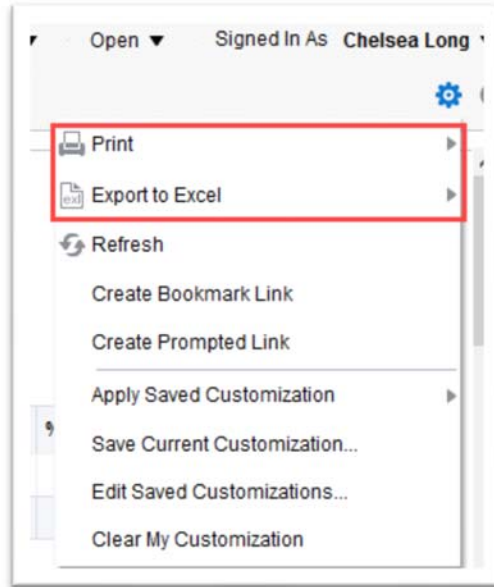


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Exporting & Printing: The 2 Methods

Method One: From the Page Options Menu

- Clicking on the Page Options menu offers the user the choice to Print or Export to Excel



- Selecting **Print** provides the options to Print to PDF or Print to HTML.
 - This will result in a PDF or HTML file of the current Dashboard Page.
- Selecting **Export to Excel** provides the options to export the Current Dashboard Page or the Entire Dashboard.
 - Choosing the **Current Page** will export the active Dashboard Page currently visible on the screen.
 - Choosing the **Entire Dashboard** will export all Dashboard Pages contained within the Dashboard.

TIP: All expanded sections will Print or Export. Collapsing sections will remove them from the Printed or Exported file.

Method Two: Within the Dashboard Section

- Within each dashboard section there are **Print and Export links** located at the bottom of the section. Clicking on either of these links will provide Export and Print options.

Emory University Unrestricted Operating Budget (UOB)
 As of Date : 08/09/2018
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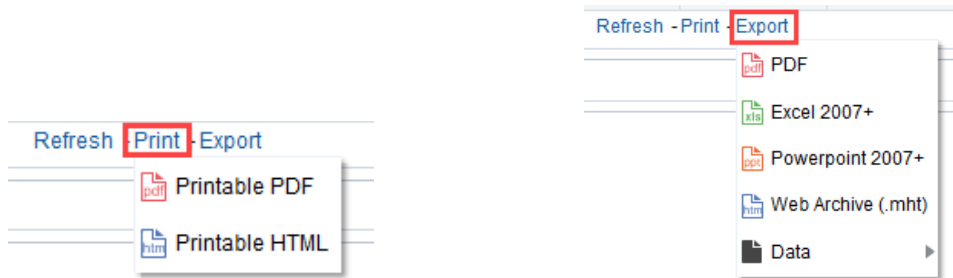
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Grand Total	1,231,176.00	16,227.00	1,247,403.00	111,147.28	1,246,290.30	381.05		731.65	99.91%

Refresh [Print - Export](#)




Printing & Exporting from EBI



TIP: Printing or Exporting using the links within each dashboard section results in a printable/exported document containing only the dashboard elements within that section

Collapsing Sections on a Dashboard

- To collapse a section on a dashboard, simply click on the triangle in the upper left-hand corner of the section.

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UOB FORMAT UOB Summary ▼

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Refresh - Print - Export

- Once collapsed, the elements contained in the section are no longer visible and will not export or print from the Page Options menu

TIP: For a “formatted” report look, collapse the prompt section, and any other irrelevant dashboard sections (ie: sections containing no data)



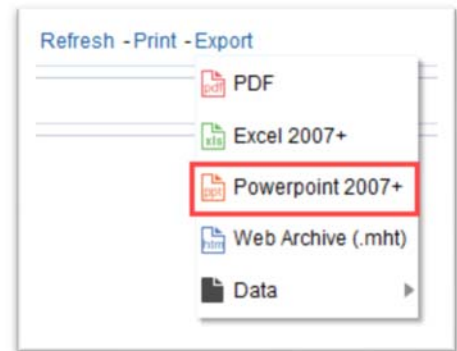
Printing & Exporting from EBI

Exporting Visualizations to PowerPoint

- Navigate to a visualization or analysis that you would like to incorporate into a PowerPoint presentation.
- Under each visualization there are hyperlinks available to Print or Export the analysis.



- Click on the link to **Export** the analysis and a menu will appear.
- From the menu, **choose PowerPoint 2007+**
- The visualization will be exported as an image to a PowerPoint slide that can be utilized in presentations.



More Information:

For additional assistance, please contact the Analytics & Reporting team via the [Finance Support Center](#). Choose **Emory Business Intelligence (EBI)/Reporting** as your ticket category.